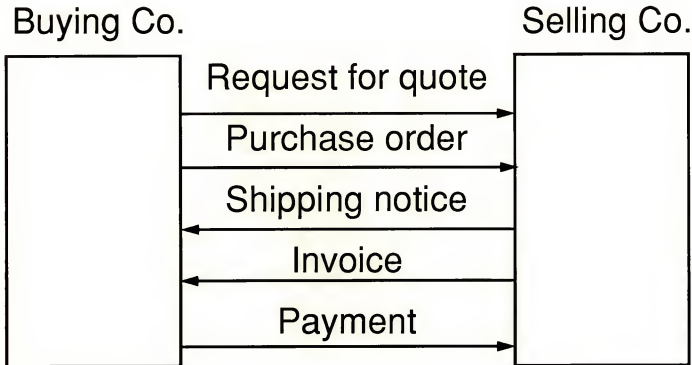


EDI Messages



ED-110



Mainstream EDI Markets

- Manufacturing
- Transportation
- Distribution

ED-95

Specialized EDI Markets

- Health care
- Finance
- Government

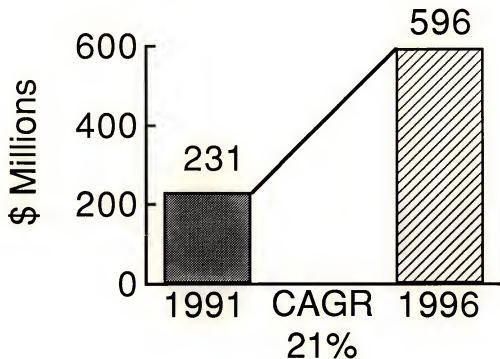
ED-98

Emerging EDI Markets

- Travel and tourism
- Communications/media
- Education
- Construction

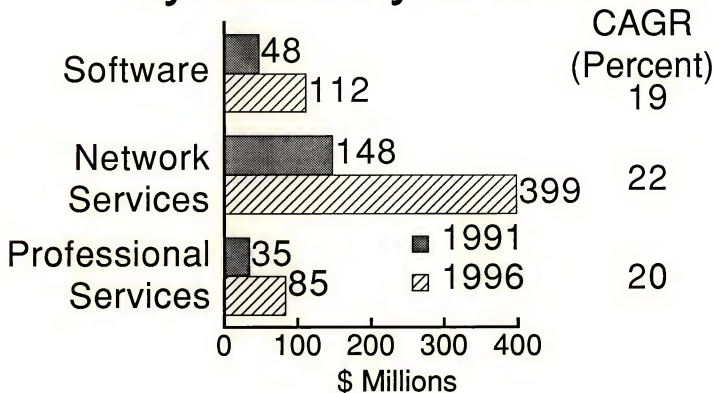
ED-97

U.S. EDI Services and Software Market 1991-1996



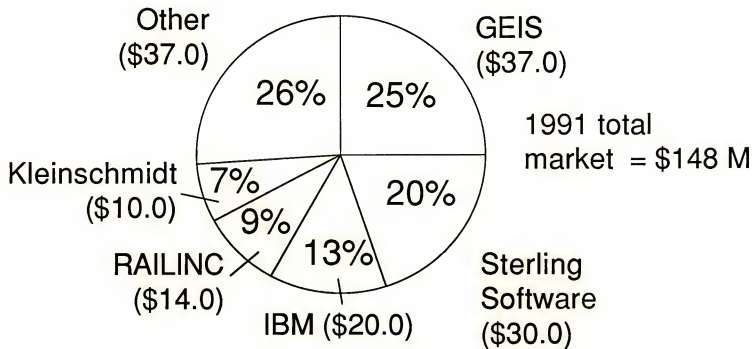
ED-91

U.S. EDI Market Growth by Delivery Mode



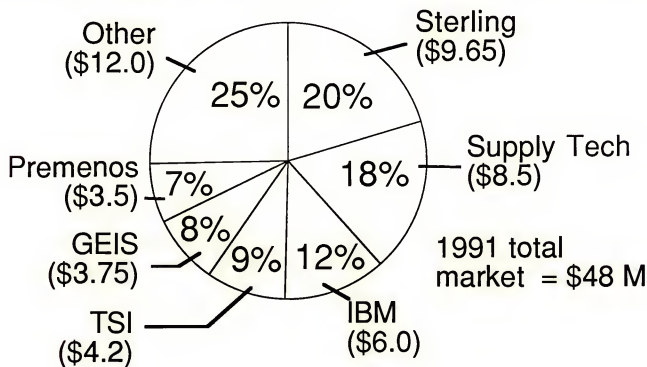
ED-90

1991 Market Share Leading EDI VANs



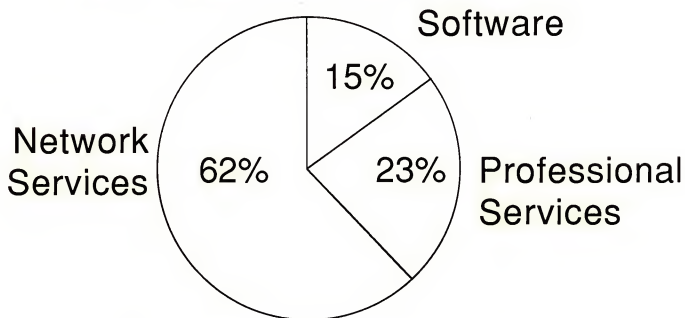
ED-99

1991 Market Share Leading EDI Software Vendors



ED-94

European EDI Market Components, 1991



Total market = \$100 million

ED-109

Trends in EDI

- Consolidaton of vendors
- Price competition
- Growing diversity of EDI applications
- Users slow to integrate
- EDI architecture changing

ED-113

Definition of Electronic Commerce

Electronic commerce is the facilitation and recording of commercial transactions among organizations by interorganizational computer-based systems.

ED-54

Electronic Commerce Examples

Agribusiness - ARI Network Services

Pharmaceuticals - Sterling Software

Insurance - IVANs

Retail - Sears, Wal-Mart

Transportation - (Port Systems)

Retail - Transnet

ED-100

Electronic Commerce: Health Care

Application	\$ Millions
EDI	17
Claims processing	300
Claims payment	<1
Electronic information services	303
Network applications	180
Total	800

ED-109

Grocery Electronic Commerce

Service	\$ Millions
EDI	20
Card processing	510
Check authorization	200
Electronic marketing	100

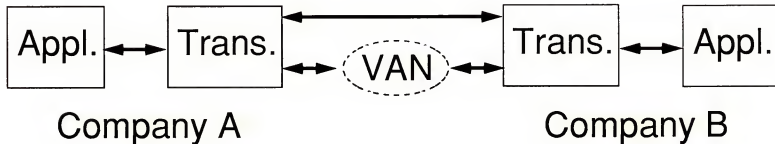
ED-107a

Grocery Electronic Commerce

Service	\$ Millions
Product movement	450
Commodity markets	300
Other	200
Total	1,780

ED-107b

The Different Kinds of Real-Time EDI



ED-115

PC Software Markets

	1991 (\$M)	90-91 Growth (%)
EDI	30	50
Workflow	120	-
Spreadsheet	950	35

ED-116a

5

PC Software Markets

	1991 (\$M)	90-91 Growth (%)
Data Base	400	15
Word Processing	1,100	24
Accounting	933	20

ED-118b

3rd Party Network Markets

	1991 (\$M)	CAGR 91-96 (%)
EDI	148	22
E-Mail	350	23
EDI/EFT	13	50

ED-117

